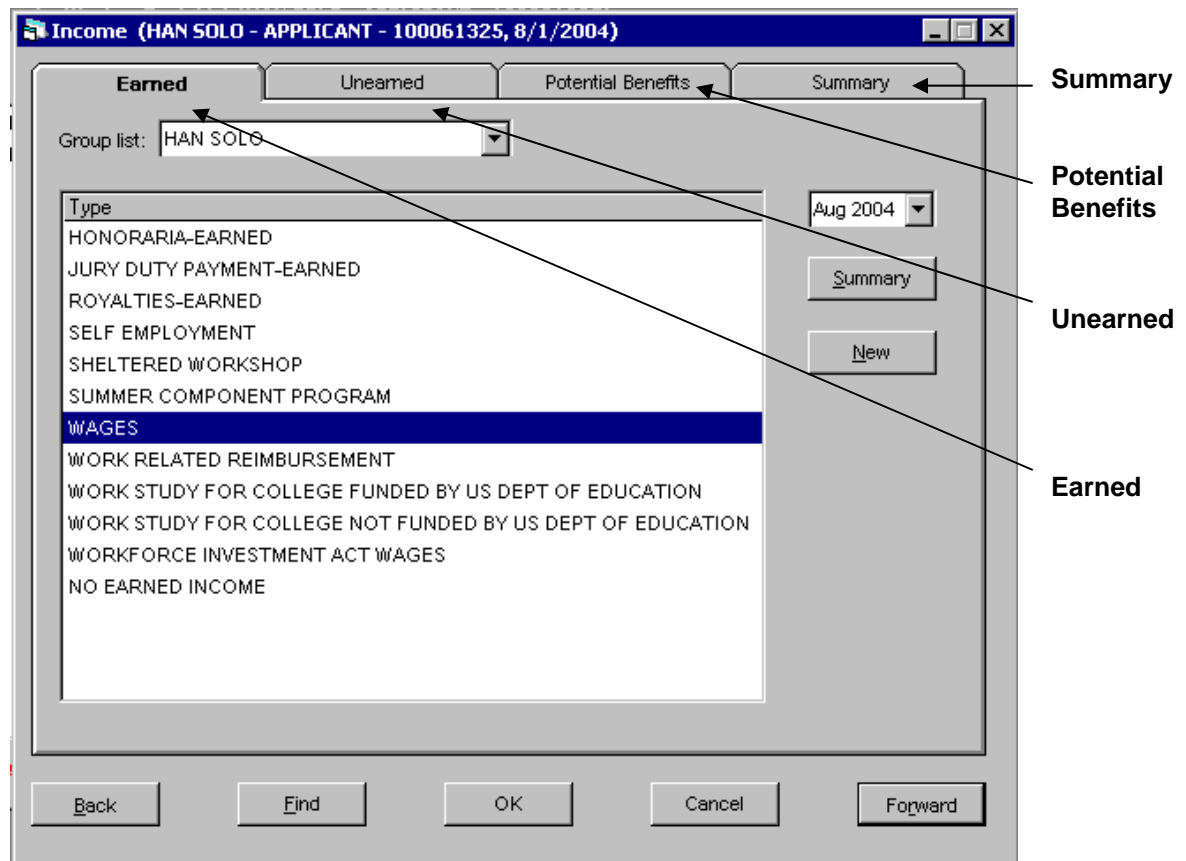


Income

1. Introduction

The “**Income**” window has four tabs:

- Earned
- Unearned
- Potential Benefits (not used by KidsCare)
- Summary



Each of these tabs will be described in detail in this chapter.

The “**Earned**” and “**Unearned**” tabs all have the following:

- **Summary** Lists all the income previously entered into the system on that tab.
- **New** Allows you to add a new detail window to enter income not previously entered into the system on that tab.
- **List** Displays different types of income you may

select.

- **Detail**

Opens the detail window for the selected item previously entered. Allows you to review and/or modify an entry.

Income (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Earned Unearned Potential Benefits Summary

Group list: HAN SOLO

Type of Income	Source of Income	Reported Amount
NO EARNED INCOME		

Aug 2004

List

Detail

Back Find OK Cancel Forward

List

Detail

Income (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Earned Unearned Potential Benefits Summary

Group list: HAN SOLO

Type

- HONORARIA-EARNED
- JURY DUTY PAYMENT-EARNED
- ROYALTIES-EARNED
- SELF EMPLOYMENT
- SHELTERED WORKSHOP
- SUMMER COMPONENT PROGRAM
- WAGES**
- WORK RELATED REIMBURSEMENT
- WORK STUDY FOR COLLEGE FUNDED BY US DEPT OF EDUCATION
- WORK STUDY FOR COLLEGE NOT FUNDED BY US DEPT OF EDUCATION
- WORKFORCE INVESTMENT ACT WAGES
- NO EARNED INCOME

Aug 2004

Summary

New

Back Find OK Cancel Forward

The function of the buttons on the “**Earned**” and “**Unearned**” tab changes depending on whether or not an income record was previously created in ACE. The following table shows how the information is displayed based upon whether income records exist in ACE:

If an income record...	The buttons will display as...	The income grid will display...
Was <u>not</u> previously created in ACE...	<ul style="list-style-type: none"> • Summary • New 	The list of available income types.
Has been entered into ACE...	<ul style="list-style-type: none"> • List • Detail 	A summary of the existing income records.

Make sure the “**List**” button is displayed in order to see the “**Summary**” of all income previously entered for the group member.

If no income has been previously entered on the “**Income**” tab, ACE will only allow you to see the “**List**” view.

Remember: Make sure you are looking at information for the correct group member and control date.

When the “**List**” button is displayed, you are viewing the “**Summary**”. The “**Summary**” displays the following information:

- **Type of Income** Displays the different types of earned income, unearned income, or potential benefit.
- **Source of Income** Displays the source where the income originated.
- **Reported Amount** Displays the amount of income reported.

The “**Source of Income**” and “**Reported Amount**” is information entered on the “**Detail**” window, specific to that income.

The screenshot shows a software window titled "Income (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)". It has four tabs: "Earned", "Unearned", "Potential Benefits", and "Summary". The "Summary" tab is active. Below the tabs is a "Group list:" dropdown menu showing "HOMER SIMPSON". To the right of the table is a date selector set to "Feb 2005". Below the date are "List" and "Detail" buttons. At the bottom of the window are "Back", "Find", "OK", "Cancel", and "Forward" buttons.

Type of Income	Source of Income	Reported Amount
WAGES	Nuclear Power Plant	1,730.00

Arrows from labels on the right point to the table data:

- Reported Amount** points to the value "1,730.00".
- Source of Income** points to the text "Nuclear Power Plant".
- Type of Income** points to the text "WAGES".

The first income tab in the Standard Path is the “**Unearned**” income tab.

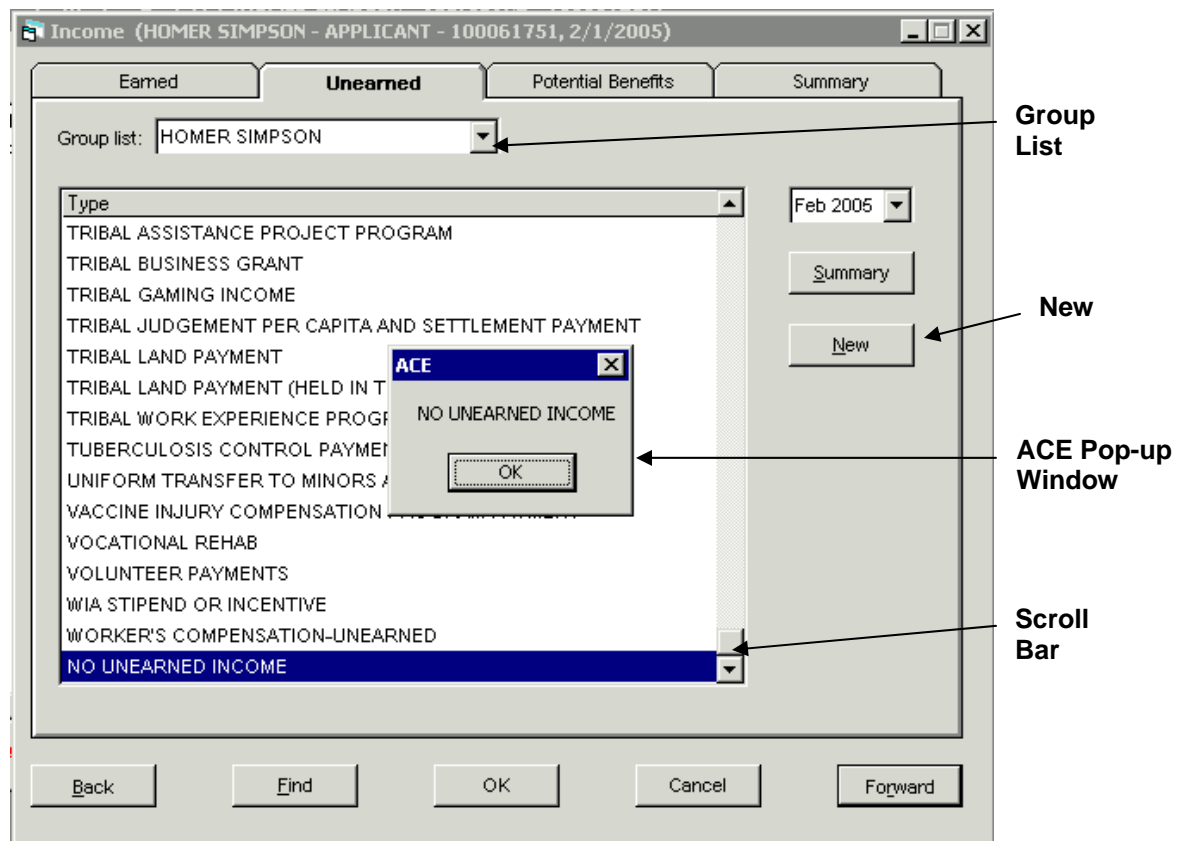
2. Unearned Income

Remember; make sure you are entering the information for the correct group member.

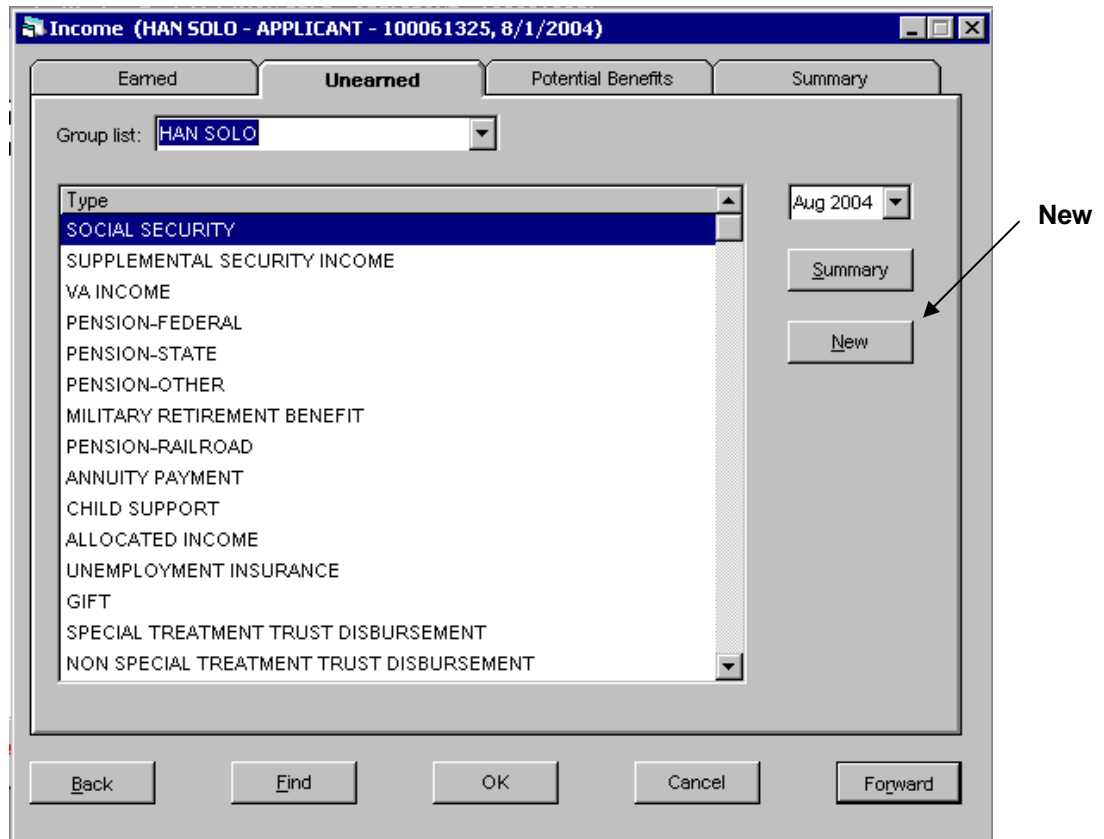
To view the listing under “**Type**”, the “**Summary**” button must be displayed. There are many choices listed under “**Type**” along with a “**NO UNEARNED INCOME**” option. Frequently seen unearned

income is displayed at the top of the list, with less commonly found unearned income types in alphabetical order at the bottom. To view the remaining **“Unearned”** types use the ▼ (down arrow) on the vertical scroll bar. To use the vertical scroll bar, place your cursor on the ▼, and hold the left button down. When you reach the type for which you are looking, release the left button.

If a group member does not receive unearned income, select the **“NO UNEARNED INCOME”** option and click the **“New”** button or simply double click on the **“NO UNEARNED INCOME”** option. An ACE pop-up window will appear with the **“NO UNEARNED INCOME”** message and an **“OK”** button. Click the **“OK”** button on the ACE window to save the record.



Most of the unearned income detail windows appears the same, regardless of which **“Type”** is selected. In the example below, **“Social Security”** was selected. To view the income detail window, click on **“Social Security”**, causing it to be highlighted then click **“New”** or simply double click on **“Social Security”**.



On the “**Unearned Income Detail**” window you will see the following:

- Type
- Frequency
- Income Source
- Income Detail
- Expenses/Disregard Detail
- Exclude from Averaging
- Summary Detail
- COLA (Not used for KidsCare)
- Transferred (Not used for KidsCare)
- Assign to Trust (Not used for KidsCare)

Unearned Income Detail (MARGE SIMPSON - APPLICANT - 100061752, 2/1/2005)

Type: Frequency:

Income Source

Company: Phone, Ext.:

Address: E-mail:

City, State, Zip: Fax:

COLA

No ☐ Yes ☐ Date:

Income Detail

Date received: Gross amount:

Expense/Disregard Detail

Date: Type: Amount:

☐ Exclude from averaging Reason: Amount:

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason

Totals:

Prior Next New Delete OK Cancel

Transferred: ☐ ☐

Assign to Trust: ☐

Verified:

Add Clear Remove

The first field is “**Type**”. ACE defaults to the type chosen from the “**Type**” list on the “**Unearned**” tab.

The second field is “**Frequency**”. Use the ▼ (down arrow) to view the frequency selection, or begin typing in the word and ACE will default to the first word. The “**Frequency**” choices are:

- Weekly
- Bi-weekly
- Monthly
- Annually
- Actual
- Semi-annually
- Quarterly
- Semi-monthly
- Unscheduled

Note: If child support is received monthly, but have multiple checks within a month, use the frequency “**Actual**”.

The next grid is “**Income Source**”. This grid contains the following fields:

- **Company** Enter the name of the company/agency issuing the payments. If a common unearned income like Social Security is selected, ACE will default to the company/agency name.
- **Address** Enter the full address of the company/agency (if known). For common unearned income, such as Social Security, ACE will default to the company/agency name.

- **Phone/ Fax** Enter the phone number, and the fax number, if known.
- **E-mail** Enter the e-mail address, if known.

The screenshot shows the 'Unearned Income Detail' form for MARGE SIMPSON. The 'Frequency' dropdown menu is open, showing options: WEEKLY, BI-WEEKLY, MONTHLY, ANNUALLY, ACTUAL, SEMI-ANNUALLY, QUARTERLY, SEMI-MONTHLY, and UNSCHEDULED. A bracket is drawn around this menu. An arrow points from the word 'Frequency' to the 'Verified' field, which has a 'No' button next to it.

The next grid is “**Income Detail**”. The following fields must be completed:

- **Date Received** Enter the date the income is received. You can either type in the date, or click on the ▼ (down arrow) to view the calendar, and select a date.
- **Gross Amount** Enter the gross amount of the income (before deductions). If there are zero cents, you do not need to add the decimal points. For example you can enter \$987, instead of \$987.00.

of the deceased person's last illness, and burial, paid by the beneficiary of the death benefits.

For income calculation to determine the income derived from death benefits, subtract the total expenses from the total death benefits.

- **Honoraria**

The portion of an honorarium, which is not payment for services rendered (e.g., travel expenses to be a guest speaker), is counted unearned income. However, this is only to the extent that it exceeds the expenses it is intended to cover. If the payment is less than the expense, the payment is excluded.

- **Military Allowance**

Hostile fire pay is excluded unearned income.

Free on-base housing is considered In-Kind Support and Maintenance (ISM) and is, therefore, excluded unearned income. In some cases, the service branch may pay a full quarter's allowance to a service member living in free on-base housing, but then deduct the allowance (rather than rent) in the same month. This transaction is just for accounting purposes, and the individual is actually receiving rent-free shelter. A quarter's allowance is excluded if the allowance is paid, and deducted, in the same pay period.

Manually subtract out the excluded portion, and enter the adjusted gross income in the “**Gross Amount**” field. Enter an explanation of the manual deduction in the “**Comments**” window. The “**Comments**” window is explained in **Comments Chapter**. After entering the adjusted gross amount click on the “**Add**” button. The “**Date Received**” and “**Gross amount**” are now displayed in the “**Summary Detail**” grid.

If you discover an error in the data entry prior to clicking on “**Add**”, click on “**Clear**” to remove the entry.

If you discover an error after clicking on “**Add**”, click on “**Remove**” to delete the entry, and enter the correct information.

Unearned Income Detail (MARGE SIMPSON - APPLICANT - 100061752, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address:
 City, State, Zip: E-mail:
 Fax:

Transferred: ☐
 Assign to Trust: ☐
 Verified: ☒ No ☐ R

COLA: No ☒ Yes ☐ Date:
 Income Detail: Date received: Gross amount:

Expense/Disregard Detail
 Date: Type: Amount:

☐ Exclude from averaging Reason: Amount:

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason
	2/1/2005	987.00				

Totals:

Prior Next New Delete OK Cancel

Add
Clear
Remove
Summary Detail

If the customer receives income from a source more than once in a month each pay date is entered. If the income is received bi-weekly, enter each date separately. For example, if the individual receives child support payments on the 1st, 15th, and the 29th, you should have three entries. Each pay date must be entered, as the gross amounts may differ.

Unearned Income Detail (BART SIMPSON - APPLICANT - 100061753, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address:
 City, State, Zip: E-mail:
 Fax:

Transferred: ☐
 Assign to Trust: ☐
 Verified: ☒ No ☐ R

COLA: No ☒ Yes ☐ Date:
 Income Detail: Date received: Gross amount:

Expense/Disregard Detail
 Date: Type: Amount:

☐ Exclude from averaging Reason: Amount:

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason
	1/5/2005	200.00				
	1/19/2005	200.00				

Totals:

Prior Next New Delete OK Cancel

Bi-weekly Checks

The next grid is “**Expense/Disregard Detail**”. If the individual does not have an allowable expense/disregard deduction, the fields may be left blank. *If the individual is eligible for an expense/disregard deduction, complete the following fields:*

- **Date** The system will default to the date entered in “**Income Detail**”. If the income is received more than once monthly, use the ▼ (down arrow) to select the correct date.
- **Type** Use the ▼ (down arrow) to view the reasons for income disregard. The system will provide a list of expenses for different income types. Click on the reason that best describes why the income, or part of the income, should be disregarded.
- **Amount** Enter the amount of income that is to be disregarded. If the customer does not qualify for expenses or disregards, leave blank.

Unearned Income Detail (MARGE SIMPSON - APPLICANT - 100061752, 2/1/2005)

Type: SOCIAL SECURITY Frequency: MONTHLY

Income Source
Company: Social Security Administration
Address:
City, State, Zip:
Phone, Ext.: - -
E-mail:
Fax: - -

COLA
No ☐ Yes ☐ Date: / /

Income Detail
Date received: / / Gross amount:
Add
Clear

Expense/Disregard Detail
Date: 2/1/2005 Type: Amount:
Exclude from averaging Reason: Amount:
Remove

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason
	2/1/2005	987.00				

Totals: \$987.00 \$0.00 \$0.00
Prior Next New Delete OK Cancel

Expense/
Disregard
Detail

Expense
Amount

Expense
Type

The next grid is the “**Exclude from averaging**” check box. Check this box if a check that is being entered into ACE should not be included when averaging the income. If a check needs to be excluded, complete the following fields:

- **Exclude from** Check the box to indicate that the check

averaging

should not be including when averaging the customer's income.

- **Exclude reasons**

Use the ▼ (down arrow) to view the reasons for excluding the check. Click on the reason that best describes why the check should not be considered when averaging the checks.

Unearned Income Detail (BART SIMPSON - APPLICANT - 100061753, 2/1/2005)

Type: CHILD SUPPORT Frequency: BI-WEEKLY

Income Source
Company: Absent Parent Phone, Ext.: - -
Address: E-mail:
City, State, Zip: Fax: - -

COLA
No ☒ Yes ☐ Date: / /

Income Detail
Date received: 01/24/2005 Gross amount: 700.00

Expense/Disregard Detail
Date: / / Type: Amount:

☒ Exclude from averaging Reason: UNUSUALLY HIGH OTHER Amount: 700.00

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason
	1/5/2005	200.00				
	1/19/2005	200.00				

Totals: \$400.00 \$0.00 \$0.00

Prior Next New Delete OK Cancel

Exclude from Averaging

Exclude Amount

Exclude Reason

After entering “**Date**”, “**Type**”, and “**Amount**” click on the “**Add**” button. The information entered, “**Date**”, “**Type**”, and “**Amount**”, is now displayed in the “**Summary Detail**” grid.

Remember, if you discover an error in the data entry prior to clicking on “**Add**”, click on “**Clear**” to remove the entry. If you discover an error after clicking on “**Add**”, click on “**Remove**” to delete the entry, and enter the correct information.

The last grid, “**Summary Detail**”, has seven fields, and the system will automatically display the information entered in the grids above it.

Unearned Income Detail (BART SIMPSON - APPLICANT - 100061753, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address: E-mail:
 City, State, Zip: Fax:

COLA
 No ☒ Yes ☐ Date:

Income Detail
 Date received: Gross amount:

Expense/Disregard Detail
 Date: Type: Amount:

☐ Exclude from averaging Reason: Amount:

Exclude	Date Received	Amount	Exclude Amount	Expense Type	Expense Amount	Exclude Reason
	1/5/2005	200.00				
	1/19/2005	200.00				

Totals:

Prior Next New Delete OK Cancel

Remove

Select the record you want to remove

To remove an entry from the “**Summary Detail**” grid, click on the entry causing it to be highlighted. Click “**Remove**”.

Below the “**Summary Detail**” is a section that reflects the totals for “**Amount**”, “**Excluded Amount**”, and “**Expense Amount**”.

The buttons at the bottom of the income detail window allow you to navigate between detail windows. Several of these buttons may be disabled if only one income record exists and if you are viewing the first or the last record in the summary on that individual.

- Prior** Saves information entered, and travels back to the detail window of the previous income on the income summary. This button is disabled when only one income record exists or when you are viewing the first record in the summary.
- Next** Saves information entered, and travels to the next detail window on the income summary. This button is disabled when only one income record exists or when you are viewing the last record in the summary.
- New** Allows you to create an additional detail window for the same type of income. For example, if the individual has three different pensions, you may add the different pension

types after you are in the detail window. By clicking on the **“New”** button, a new or additional detail window will open.

- **Delete** Eliminates a detail window.
- **OK** Saves information entered on that tab/window, and closes the window.
- **Cancel** Does not save information entered on that tab/window, and closes the window.



Click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Earned”** tab.

3. Earned Income

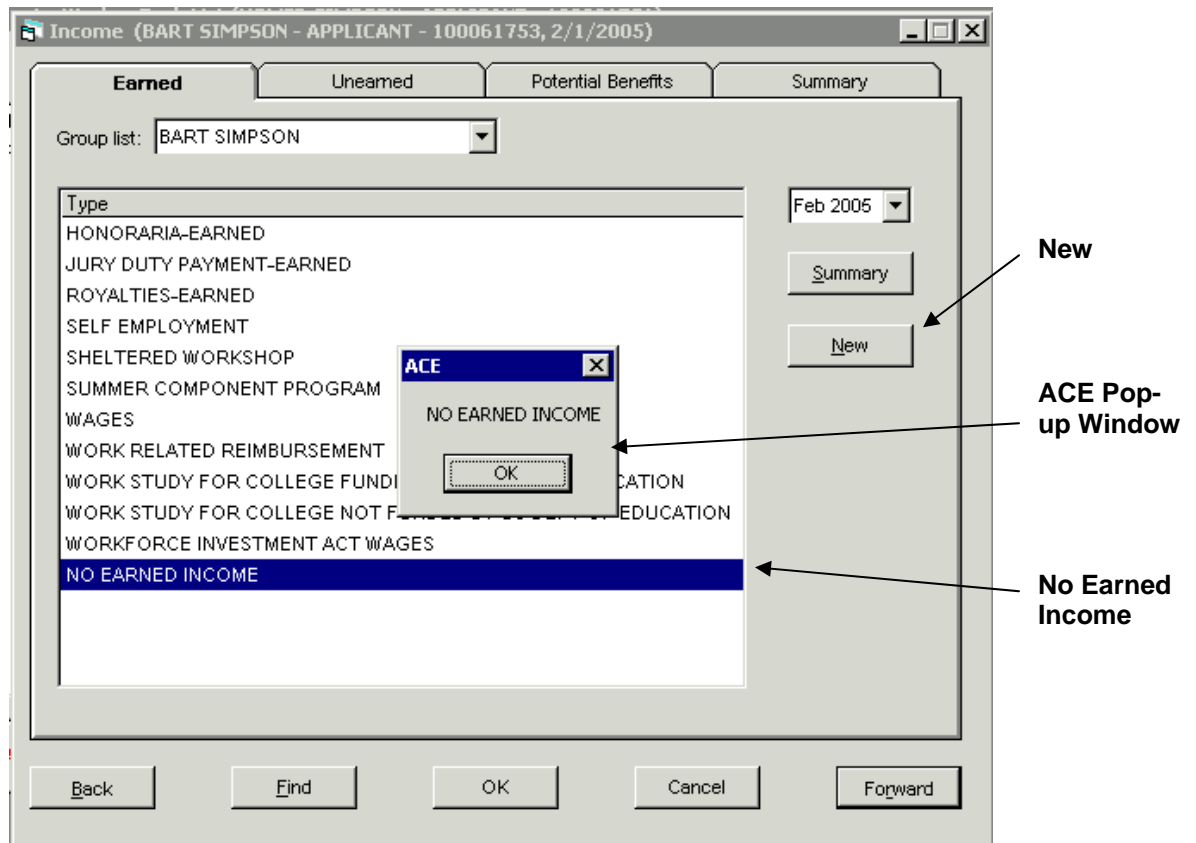
The second income tab in the Standard Path is **“Earned Income”**.

Remember, make sure you are entering the information for the correct group member.

To view the list of available income types under **“Type”**, the **“Summary”** button must be displayed. There are eleven income types listed in alphabetical order under **“Type”** along with a **“NO EARNED INCOME”** option.

Enter the **“NO EARNED INCOME”** option for any household members over the age of 14 who do not have any earned income.

To indicate that a group member does not receive earned income, select the **“NO EARNED INCOME”** option and click the **“New”** button or simply double click on the **“NO EARNED INCOME”** option. An ACE pop-up window will appear with the **“NO EARNED INCOME”** message and an **“OK”** button. Click the **“OK”** button on the ACE pop-up window to save the record.



If the group member has earned income, select the correct **"Type"**. Each of the detail windows appears the same, regardless of which **"Type"** is selected. In the example below, **"Wages"** was selected. To view the detail window, click on **"Wages"**, causing it to be highlighted then click **"New"** or simply double click on **"Wages"**.

Income (HAN SOLO - APPLICANT - 100061325, 8/1/2004)

Earned | Unearned | Potential Benefits | Summary

Group list: HAN SOLO

Type

- HONORARIA-EARNED
- JURY DUTY PAYMENT-EARNED
- ROYALTIES-EARNED
- SELF EMPLOYMENT
- SHELTERED WORKSHOP
- SUMMER COMPONENT PROGRAM
- WAGES**
- WORK RELATED REIMBURSEMENT
- WORK STUDY FOR COLLEGE FUNDED BY US DEPT OF EDUCATION
- WORK STUDY FOR COLLEGE NOT FUNDED BY US DEPT OF EDUCATION
- WORKFORCE INVESTMENT ACT WAGES
- NO EARNED INCOME

Aug 2004

Summary

New

Back Find OK Cancel Forward

New

Wages

On the “**Earned Income Detail**” window you will see the following grids:

- **Type**
- **Frequency**
- **Income Source**
- **Income Detail**
- **Expense/Disregard Detail**
- **Exclude from Averaging**
- **Summary Detail**

Earned Income Detail (BART SIMPSON - APPLICANT - 100061753, 2/1/2005)

Type: Frequency:

Income Source: Company: Phone, Ext.:
 Address: E-mail:
 City, State, Zip: Fax:

Income Detail: Date paid: Gross amount: Hours worked:

Expense/Disregard Detail: Pay dates: Type: Amount:

☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason

Totals:

Prior Next New Delete OK Cancel

Frequency
Type
Income Source
Income Detail
Exclude from Averaging
Summary Detail

The first field is “**Type**”. ACE will default to the type chosen from the “**Type**” list on the “**Earned**” income tab.

The second field is “**Frequency**”. Use the ▼ (down arrow) to view the frequency selection, or begin typing in the word, and ACE will default to that word. The “**Frequency**” choices are:

- **Weekly**
- **Bi-weekly**
- **Monthly**
- **Annually**
- **Actual**
- **Semi-annually**
- **Quarterly**
- **Semi-monthly**
- **Unscheduled**

The next grid is “**Income Source**”. This grid contains the following fields:

- **Company** Type in the name of the company issuing the payments.
- **Address** Type in the full address of the company, if known.
- **Phone/Fax** Type in the phone number, and the fax number, if known.
- **E-mail** Type in the e-mail address, if known.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency: **Frequency**

Income Source: Phone, Ext.: E-mail: Fax:

Address: City, State, Zip:

Income Detail: Date paid: Gross amount: Hours worked:

Expense/Disregard Detail: Pay dates: Type: Amount:

☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason
	1/5/2005	35.00	350.00			
	1/12/2005	40.00	400.00			
✓	1/19/2005	60.00	600.00			UNUSUALLY HIGH OVERTIME
	1/26/2005	38.00	380.00			

Totals:

The next grid is “**Income Detail**”. The following fields must be completed:

- **Date Paid** Enter the date the income is received. You can either type in the date, or click on the ▼ (down arrow) to view the calendar, and select a date.
- **Gross Amount** Enter the gross amount (before deductions) of the income. If there are zero cents, you do not need to add the decimal points. For example, you can enter \$400, instead of \$400.00.
- **Hours worked** Type in the number of hours the individual worked in the pay period.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address: E-mail:
 City, State, Zip: Fax:

Transferred: ☐
 Assign to Trust: ☐
 Verified:

Income Detail
 Date paid: Gross amount: Hours worked:
 Add Clear

Expense/Disregard Detail
 Pay dates: Type: Amount:
☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason

Totals:

Date Paid
Gross Amount
Hours Worked

Clicking the **“Add”** button moves the income to the summary grid, and opens up these fields for entry of additional income received in the same month from that source. After entering the gross amount, click on the **“Add”** button. The **“Date Paid”** and **“Gross amount”** are now displayed in the **“Summary Detail”** grid.

If you discover an error in the data entry prior to clicking on **“Add”**, click on **“Clear”** to remove the entry. If you discover an error after clicking on **“Add”**, click **“Remove”** to delete the entry, and enter the correct information.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency:

Income Source
 Company:
 Address:
 City, State, Zip:

Phone, Ext.:
 E-mail:
 Fax:

Transferred: ☐
 Assign to Trust: ☐
 Verified: ☒ No ☐ R

Income Detail
 Date paid: Gross amount: Hours worked:

Expense/Disregard Detail
 Pay dates: Type: Amount:

☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason
	1/5/2005	40.00	400.00			

Totals:

Prior Next New Delete OK Cancel

Add
Clear
Remove

If the income is received weekly, enter each pay date separately.
 For example, if the individual receives payments every Friday, for the month of January you would complete four entries.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency:

Income Source
 Company:
 Address:
 City, State, Zip:

Phone, Ext.:
 E-mail:
 Fax:

Transferred: ☐
 Assign to Trust: ☐
 Verified: ☒ No ☐ R

Income Detail
 Date paid: Gross amount: Hours worked:

Expense/Disregard Detail
 Pay dates: Type: Amount:

☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason
	1/5/2005	40.00	400.00			
	1/12/2005	40.00	400.00			
	1/19/2005	38.00	380.00			
<input checked="" type="checkbox"/>	1/26/2005	60.00	700.00			UNUSUALLY HIGH OVERTIME

Totals:

Prior Next New Delete OK Cancel

Summary Detail

The next grid is “**Expense/Disregard Detail**”. If the individual is eligible for expense/disregard deductions complete the following fields:

- **Date**

The system will default to the date entered in the “**Income Detail**”. If the income is received more than once monthly, use the ▼ (down arrow) to select the correct date.

- **Type**

Use the ▼ (down arrow) to view the reasons for income disregard. Click on the reason that best describes why the income, or part of the income, should be disregarded.

- **Amount**

Enter the amount of income that is to be disregarded.

Income Source
 Company: Nuclear Power Plant
 Address:
 City, State, Zip:
 Phone, Ext.: - -
 E-mail:
 Fax: - -

Income Detail
 Date paid: / / Gross amount: Hours worked:
 Add Clear

Expense/Disregard Detail
 Pay dates: Type: Amount:
 Add Clear

☐ Exclude from averaging Exclude reason:
 Remove

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason
	1/5/2005	40.00	400.00			
	1/12/2005	40.00	400.00			
	1/19/2005	38.00	380.00			
✓	1/26/2005	60.00	700.00			UNUSUALLY HIGH OVERTIME

Totals: 178 \$1,880.00 \$0.00
 Prior Next New Delete OK Cancel

Annotations:
 Pay Dates
 Amount of Expense
 Type of Expense

The next grid is the “**Exclude from averaging**” check box. Check this box if a check that is being entered into ACE should not be included when averaging the income. If a check needs to be excluded, complete the following fields:

- **Exclude from averaging**

Check the box to indicate that the check should not be including when averaging the customer’s income.

- **Exclude reasons**

Use the ▼ (down arrow) to view the reasons for excluding the check. Click on the reason that best describes why the check should not be considered when averaging the checks.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address:
 City, State, Zip: E-mail:
 Fax:

Income Detail
 Date paid: Gross amount: Hours worked:

Expense/Disregard Detail
 Pay dates: Type: Amount:

☒ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Exclude Reason
	1/5/2005	40.00	400.00	UNUSUALLY HIGH SEASONAL WORK
	1/12/2005	40.00	400.00	UNUSUALLY HIGH BONUS
	1/19/2005	38.00	380.00	UNUSUALLY HIGH OTHER
				UNUSUALLY LOW UNPAID LEAVE
				UNUSUALLY LOW SEASONAL WORK
				UNUSUALLY LOW OTHER
				CHANGE IN HOURLY RATE
				CHANGE IN NUMBER OF HOURS

Totals:

Transferred:
 Assign to Trust:
 Verified:

Exclude Reasons

Remember, if you discover an error in the data entry prior to clicking on “Add”, click on “Clear” to remove the entry. If you discover an error after clicking on “Add”, click on “Remove” to delete the entry, and enter the correct information.

The last grid, “**Summary Detail**”, has seven fields and the system will automatically display the information entered in the grids above it.

Earned Income Detail (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)

Type: Frequency:

Income Source
 Company: Phone, Ext.:
 Address: E-mail:
 City, State, Zip: Fax:

Income Detail
 Date paid: Gross amount: Hours worked:

Expense/Disregard Detail
 Pay dates: Type: Amount:

☐ Exclude from averaging Exclude reason:

Exclude	Date Paid	Hours	Gross	Expense/Disregard Type	Amount	Exclude Reason
	1/5/2005	40.00	400.00			
	1/12/2005	40.00	400.00			
	1/19/2005	38.00	380.00			
✓	1/26/2005	60.00	700.00			UNUSUALLY HIGH OVERTIME

Totals:

Prior Next New Delete OK Cancel

Remove
 Summary Detail

To remove an entry from the “**Summary Detail**” grid, click on the entry causing it to be highlighted. Click “**Remove**”.

Below the “**Summary Detail**” is a section that reflects the totals for “**Hours**”, “**Gross**”, “**Amount**”, “**Expense/Disregard Type**”, and “**Expense Amount**”.

After entering the information, click “**OK**” to save the information and “**Cancel**” does not save information. Both buttons close the window and returns to the tab.

Click on the “**Forward**” button to continue to the next tab in the Standard Path, which is the “**Summary**” tab.

4. Summary

The next tab in the Standard Path is the income “**Summary**” tab.

This tab summarizes all of the income entered into the system.

This is a great place to review the data with the customer, to ensure you listed all the different types of income they may receive.

It provides the following information:

- **Type of Income** Displays the types, or categories, of income received that were entered on the income tabs.
- **Source of Income** Displays the sources of the income that was entered on an income tab. In the example

below, the type is “**WAGES**” and the source is “**Nuclear Power Plant**”.

- **Reported Amount**

Displays the gross income that was entered on an income tab.

The screenshot shows a software window titled "Income (HOMER SIMPSON - APPLICANT - 100061751, 2/1/2005)". It has four tabs: "Eamed", "Unearned", "Potential Benefits", and "Summary". The "Summary" tab is selected. Below the tabs is a "Group list:" dropdown menu showing "HOMER SIMPSON". To the right of the table is a date dropdown menu showing "Feb 2005". Below the table is a "Detail" button. At the bottom of the window are five buttons: "Back", "Find", "OK", "Cancel", and "Forward".

Type of Income	Source of Income	Reported Amount
NO UNEARNED INCOME		
WAGES	Nuclear Power Plant	1,880.00

Annotations with arrows point to the following elements:

- Type of Income**: Points to the "Type of Income" column header.
- Amount**: Points to the "Reported Amount" column header.
- Source of Income**: Points to the "Source of Income" column header.

You can view a summary of the income of the entire household by selecting “**ALL MEMBERS**” on the “**Group list**”.

Income (ALL MEMBERS)

Earned Unearned Potential Benefits **Summary**

Group list: **ALL MEMBERS**

Feb 2005

Type of Income	Source of Income	Reported Amount
HOMER SIMPSON		
NO UNEARNED INCOME		
WAGES	Nuclear Power Plant	1,880.00
MARGE SIMPSON		
SOCIAL SECURITY	Social Security Administ	987.00
WAGES	Moe's Tavern	200.00
BART SIMPSON		
CHILD SUPPORT	Absent Parent	400.00
NO EARNED INCOME		
LISA SIMPSON		
NO UNEARNED INCOME		
	TOTAL	3,467.00

Detail

Back Find OK Cancel Forward

All Members

To view the detail of an income, highlight the item and click on **"Detail"**. When the detail window is open you can view the entries, and add, or correct the information already entered.

Income (ALL MEMBERS)

Group list: **ALL MEMBERS**

Summary

Feb 2005

Type of Income	Source of Income	Reported Amount
HOMER SIMPSON		
NO UNEARNED INCOME		
WAGES	Nuclear Power Plant	1,880.00
MARGE SIMPSON		
SOCIAL SECURITY	Social Security Administ	987.00
WAGES	Moe's Tavern	200.00
BART SIMPSON		
CHILD SUPPORT	Absent Parent	400.00
NO EARNED INCOME		
LISA SIMPSON		
NO UNEARNED INCOME		
	TOTAL	3,467.00

Detail

Back Find OK Cancel Forward

When you have completed all entries, click on the **“Forward”** button to continue to the next tab in the Standard Path, which is the **“Medicare”** tab.